

## Transaction

- ZPAA076
- SWBP
- PA30



PA BPP

## SEPARATION ACTION

### Change Record:

Change Date: 10/18/16	Changed by: R. McPherson
Changes:	• Important - Action History Update.

### Trigger:

There is a need to process a Separation for one of the reasons listed in the Business Process Procedure Overview section.

### Business Process Procedure Overview:

**Separation** - from State service occurs when an employee leaves for the following reasons: resignation, voluntary resignation w/o notice, separation due to unavailability, retirement, reduction-in-force, dismissal, appointment ended, and death.

- An employee provides notice that they will be leaving the State of North Carolina employment or an appointing department issues a letter to an employee telling them they will no longer be employed and the reason why.
- HR receives employee data and gathers additional information if needed
- HR initiates PCR for approval via Workflow
- HR receives approval via Inbox
- HR executes Separation Action

**NOTE:** If the individual is retiring, and has requested a 1-time deferral, the deferral **MUST** be processed after the separation action has been completely processed in the system, including all payouts. If it is processed prior to the separation process being active in the system, the deferral will be taken from their last check, and potentially the entire check will be sent to their retirement system.

This action automatically converts the direct deposit to a check in 90 days from the Separation Action effective date. It is important to verify that the address is correct.

The following reasons are available for Separation:

- 01 - Better Employment – accepted employment from private company.
- 02 -Personal Reasons – leaving for personal reasons.
- 03 - Involuntary Separation - (1) the employee's inability to return to all of his/her work schedule due to a medical condition or the vagueness of a medical prognosis; or (2) the employee and the agency cannot reach agreement on a return to work arrangement that meets both the operating needs of the agency and the employee's medical/health needs.
- 04 - Did not Report – no show

- 05 -Voluntary resigned without Notice - employee who is absent from work and does not contact the employer for three consecutive scheduled workdays may be separated from employment as a voluntary resignation.
- 06 - Reduction in Force (RIF) - employee reduced in force for reasons of shortage of funds or work, abolishment of a position, or other material changes in duties or organization (Requires OSP approval).
- 07 -No Reason Given – employee didn't give a reason.
- 08 - Long-Term Disability – employee has exhausted short-term disability and been approved by the Retirement System to be separated to Long-Term Disability.
- 09 - Retirement - The last day of work shall be the date separated, except in cases where an employee is exhausting leave prior to retirement. If the last day of work is the last workday in the month, the employee shall be paid for the full month. SEE NOTE ABOVE ABOUT DEFERRALS
- 10 - Retirement Disability – employee receives disability until they meet retirement eligibility.
- 11 - Contract Ended – end of contract.
- 12 - Time Limited Appt. Term – end of time-limited appointment.
- 13 - Supplemental Appt. Term – end of temporary appointment.
- 14 - Appointment Ended - separation occurs when an employee is terminated for reasons other than just cause from one of the following positions:
  - Exempt positions appointed by the Governor,
  - Policy/making positions,
  - Confidential assistants and secretaries, or
  - Chief deputy or chief administrative assistant.
  - Certain Judicial Branch positions.
- 15 - Not Re-Elected – employee wasn't re-elected.
- 16 - Dismissed – Gross Inefficiency – separated for gross-inefficiency.
- 17 - Dismissed – Conduct – separated for conduct.
- 18 - Dismissed – Unsatisfactory Performance – separated for unsatisfactory performance.
- 20 - Prior to achieving perm status – employee involuntarily separated during probation at the initiation of management.
- 21 - Pay in lieu of notice – employee is paid for notice instead of working the notice (Requires OSP approval).
- 22 - Death - The last day of work or the day of death shall be the date separated. If the last day of work is the last workday in the month, the employee shall be paid for the full month.
- 23 - Other – no other reason is applicable.
- 24 - Terminate while on FMLA – employee did not return from FMLA.
- 25 - Beacon to Non-Beacon Agency – employee transfers to a Non-Beacon Agency. Note-- IT2012 (Time Transfer Specifications) has been added so pro-rated longevity will not be paid.
- 26 - Cancel Separation Pay Continuation – moves separated employee from inactive to withdrawn status and will no longer receive pay from BEACON.
- 27 – Removal From Office – AOC Only. This reason should only be used by the Judicial Branch for elected/appointed officials removed from office.
- 28 – RIF – Discontinued Service Retirement – employee is reduced in force and has been approved by the Office of State Budget and Management to receive discontinued service retirement. (Requires OSP Approval)
- 29 – Unavailable to Work – Employee becomes or remains unavailable for work after all applicable leave credits have been exhausted and agency management does not grant a leave without pay, or does not extend a leave without pay period, for reasons deemed sufficient by the agency.

- 40 – 115C Dismissal – Dismissal of a teacher or school administrator who was hired in a position subject to the G.S. 115C public education human resources system. **Note**—Specific reason for the dismissal as outline in G.S. 115C-325©(1) must be placed in the comments section.

#### **Tips and Tricks:**

- Prior to initiating any workflow, ensure the data being used is valid and appropriate. For example, if working with a Separation action, ensure the individual is currently listed as a valid employee (and not already separated).
- Ensure the following have been completed:
  - all timesheets have been entered, released and approved

See the **PA BPP Tips and Tricks Job Aid** for a fuller listing of Best Practices and Tips & Tricks. The job aid is located on the Training Help website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: *Personnel Administration > Job Aids*.

#### **Access Transaction:**

<b>Via Menu Path:</b>	Your menu path may contain this custom transaction code depending on your security roles.
<b>Via Transaction Code:</b>	ZPAA076

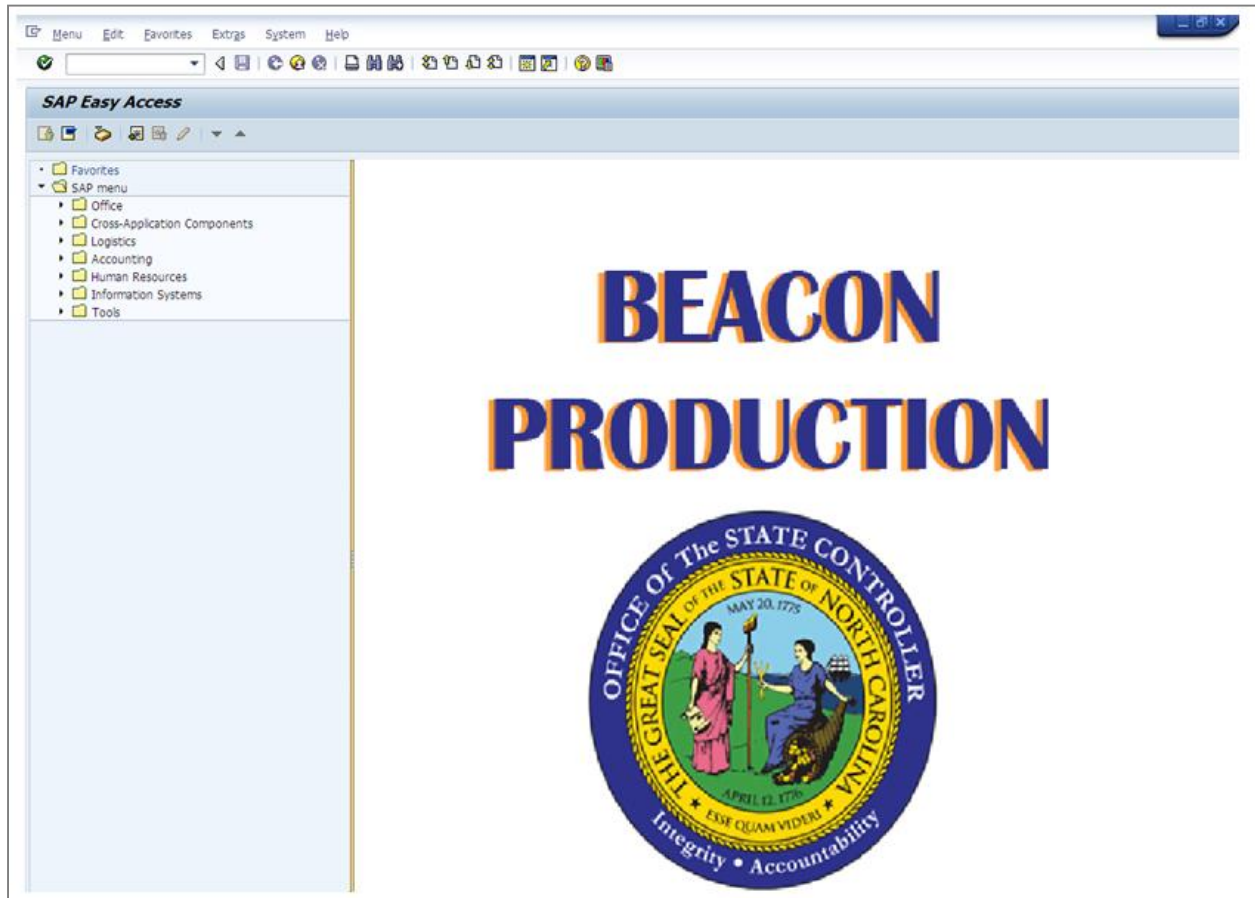


#### **Important!**

Please review the employee's action history prior to creating the Separation PCR to ensure that the Action/Reasons below have been canceled.

- ZC – Salary Adjustment / 07 – Acting Pay
- ZC – Salary Adjustment / 04 – Temp In-Range for Job Change
- Z1 – Promotion / 03 – Acting Promotion


## PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command.  <b>Example:</b> ZPAA076

2. Click the **Enter**  button.



**Information**





You may want to enter this transaction code in your Favorites folder.

- Choose Favorites > Insert Favorites
- Type in ZPAA076
- Click Enter.

To see the transaction code displayed in front of the link in your favorites:

- Choose Edit > Settings
- Place a check next to Display Technical Name
- Click Enter

**Employee Action Request**

Existing PCR No.

Personnel No.

80000610

Susan Castro

Last 4 digits (SSN)

First

Last

Effective on

06/30/2011

Action Type

Z6

Separation (NC)

Reason

01

Better Employment

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No.  <b>Example:</b> 80000610
Effective on	The date on which the action will be effective	Enter value in Effective on.  <b>Example:</b> 6/30/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type.  <b>Example:</b> ZG

Reason	Reason for the action, such as Better Employment	Enter value in Reason.  <b>Example:</b> 01
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4. Click the **Enter**  button.

Enter the Personnel Number of the individual to be separated. Click Enter to retrieve the name of the individual and verify you have the correct Personnel Number.

Although the **Effective Date** is the next day **after** the last working day, the system will automatically take this into account, so you must enter the last day worked. For example, if my last day worked was 6/30/11, then the date entered would be 6/30/11, and the system will change the date to 7/01/11 when processing the action.

The system defaults the current date, but you may change the date to a day in the past or in the future.

There are several available **Reasons** to choose. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click **Enter** and verify the information is correct before proceeding.

**NOTE:** You only enter the SSN and name for New Hire Actions.

**Employee Action Request**






Existing PCR No.

Personnel No.

80000610

Susan Castro

Last 4 digits (SSN)

First

Last

Effective on

06/30/2011

Action Type

Z6

Separation (NC)

Reason

01

Better Employment

5. Click the **Create**  button.

If the information is correct, click **Create** to begin the process.


Leave the **Existing PCR No.** field blank if you are creating a new PCR.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

Employee Action Request			
Initiate WF			
PCR Number	<input type="text"/>		
Personnel Number	80000610	Susan Castro	Action: 26 Separation (NC)
Last 4 digits(SSN)	<input type="text"/>	<input type="text"/>	Reason: 01 Better Employment
Effective on	06/30/2011	Chng <input type="text"/>	St: <input type="text"/>
CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20010310 CR CDS A&H MOH Design Sec	Org. Unit	20010310 CR CDS A&H MOH Design Sec
Job	30001528 Museum Specialist	Job	30001528 Museum Specialist
EE Position	65001875 Lighting And Interactive Design...	EE Position	65001875 Lighting And Interactive Design...
Basic Pay			
Pay Scale type	01 Graded	Pay Scale type	01 Graded
Pay Scale Area	01 Annual Salaries	Pay Scale Area	01 Annual Salaries
Pay Scale Group	GR66 Level GR	Pay Scale Group	GR66 Level GR
Annual Salary	31,959.00	Hrly Sal	0.00
Calc Step - 0	<input type="text"/>	Annual Salary	31,959.00
		Hourly Salary	0.00
		Calc Step - 0	<input type="text"/>
		Min	32,796.00
		Max	51,446.00
		Next Inc Date	<input type="text"/>
Dates			
		Last day worked	06/30/2011 <input type="checkbox"/>

6. Update the following field:

Field Name	Description	Values
Last day worked	Individual's last day of work	Enter value in Last day worked.  <b>Example:</b> 06/30/2011

7. Click the **Save (Ctrl+S)**  button.


The only field which requires entry on this Employee Action Request screen is the **Last day worked** field. Enter the date of the last day the individual was physically at work.

You may need to scroll down the screen to view this field.

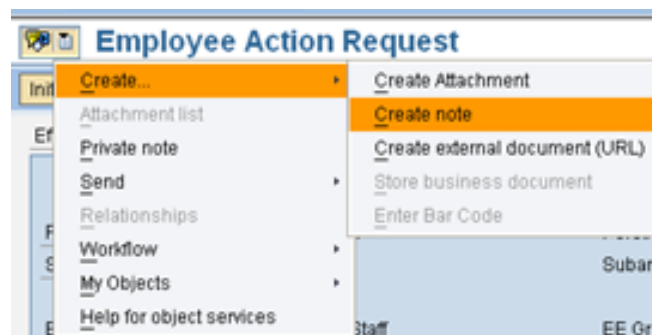
**NOTE:** DO NOT change the EE Position field to 99999999. The system will change it within the processing of the action after it has been approved.




8. Click the **(Enter)**  button.

**Information**

You may save this information as many times as you wish. Each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

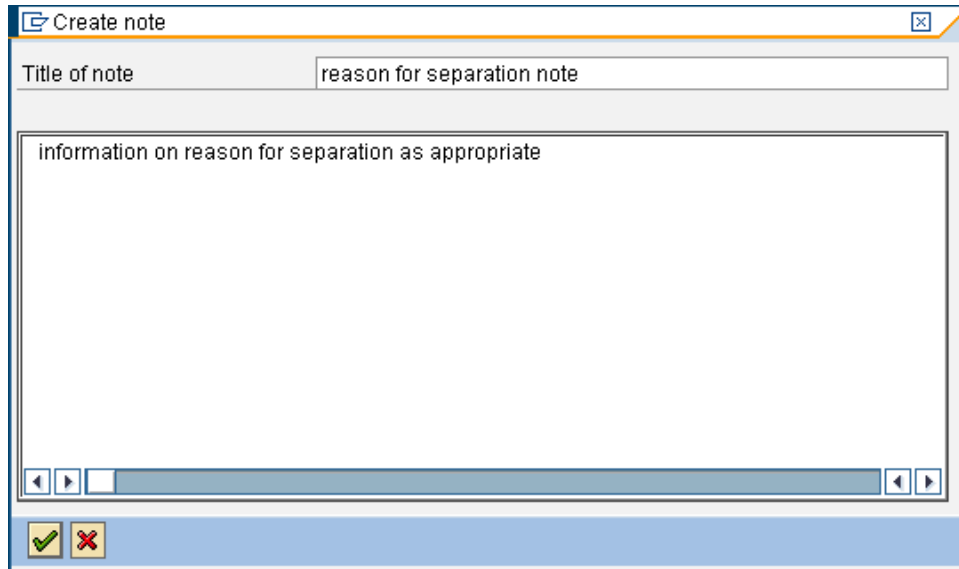


9. Click the **Services for Objects**  button.
10. Click **Create... >> Create note**.

You may enter any information that would be useful to the approvers downstream using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

Follow the OSP or agency-specific guidelines on notes and attachments to be added.






The screenshot shows a software window titled "Create note". Inside the window, there is a text input field labeled "Title of note" which contains the text "reason for separation note". Below this field is a large, empty text area with a placeholder text "information on reason for separation as appropriate". At the bottom of the window, there are two buttons: a green checkmark icon and a red X icon.

11. Update the following fields:


Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note.  <b>Example:</b> reason for separation note
Long text	An open text field	Enter value in Long text.  <b>Example:</b> the appropriate note

12. Click the **(Enter)**  button.

Employee Action Request			
Initiate WF			
PCR Number	1000005322		
Personnel Number	80000610 Susan Castro		
Last 4 digits(SSN)			
Effective on	06/30/2011	Chng	06/09/11 ZWF INOMPA031 St: D Created
<b>CURRENT</b> Pers.Area 4601 Cultural Resources Subarea NC01 7day Norm EE Group A SPA Employees EE Subgroup A1 FT N-FLSAOT Perm Org. Unit 20010310 CR CDS A&H MOH Design Sec Job 30001528 Museum Specialist EE Position 65001875 Lighting And Interactive Design...		<b>PROPOSED</b> Pers.Area 4601 Cultural Resources Subarea NC01 7day Norm EE Group A SPA Employees EE Subgrp A1 FT N-FLSAOT Perm Org. Unit 20010310 CR CDS A&H MOH Design Sec Job 30001528 Museum Specialist EE Position 65001875 Lighting And Interactive Design...	
<b>Basic Pay</b> Pay Scale type 01 Graded Pay Scale Area 01 Annual Salaries Pay Scale Group GR66 Level GR Annual Salary 31,959.00 Hrly Sal 0.00 Calc Step - 0 Min 32,796.00 Max 51,446.00 Next Inc Date			
<b>Dates</b> Last day worked 06/30/2011			

13. Click the **Save (Ctrl+S)**  button.



14. Click the **(Enter)**  button.

**Employee Action Request**

**Initiate WF**

Effective: Initiate WF (F8) 03/25/2008 Chng 03/25/08 ZWFINIT02 St: D Created

CURRENT		PROPOSED	
Pers.Area	1501 Transportation	Pers.Area	1501 Transportation
Subarea	NC08 7day Interface	Subarea	NC08 7day Interface
EE Group	0 Supplemental Staff	EE Group	0 Supplemental Staff
EE Subgroup	68 Temp FT S-FLSAOT	EE Subgrp	68 Temp FT S-FLSAOT
Org. Unit	14201411 DOT DMV L&T HQ SUPPLY & L	Org. Unit	14201411 DOT DMV L&T HQ SUPPLY & L
Job	30000288 PROCESSING ASSISTANT III	Job	30000288 PROCESSING ASSISTANT III
EE Position	54229768 PROCESSING ASSISTANT III	EE Position	54229768 PROCESSING ASSISTANT III

☐ Work Against

**Basic Pay**

CURRENT		PROPOSED	
Pay Scale type	01 Graded	Pay Scale type	01 Graded
Pay Scale Area	01 Annual Salaries	Pay Scale Area	01 Annual Salaries
Pay Scale Group	6R60 Level 6R	Pay Scale Group	6R60 Level 6R
Annual Salary	0.00 Hrly Sal 11.69	Annual Salary	0.00 Hourly Salary 11.69
Calc Step - 0		Calc Step - 0	0.00
Min	25,484.00	Min	25,484.00
Max	39,205.00	Max	39,205.00



**Dates**

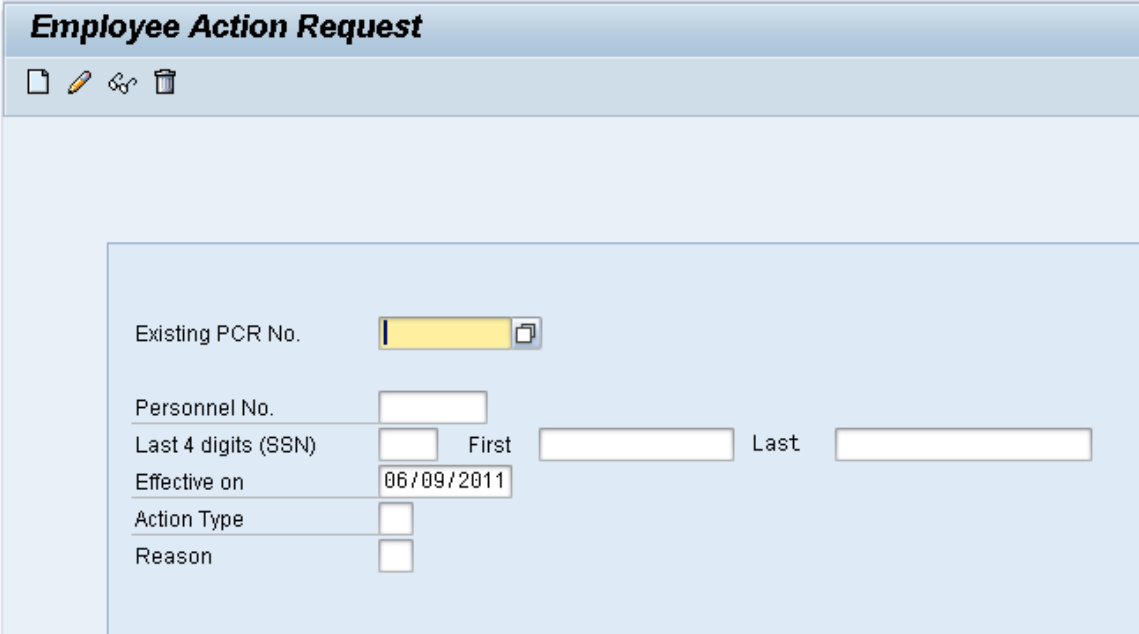
Last day worked 03/25/2008

15. Click the **Initiate WF**  button.

Select the **Initiate Workflow** button to send the Separation Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).



16. Click the **Enter**  button.
17. Click the **Back (F3)**  button.



18. Click the **Back (F3)**  button.

19. The Initiation of the Separation Action is complete.

After Workflow Approvals have been received, proceed with the complete Separation action process.

## Instructions for Completing the Action

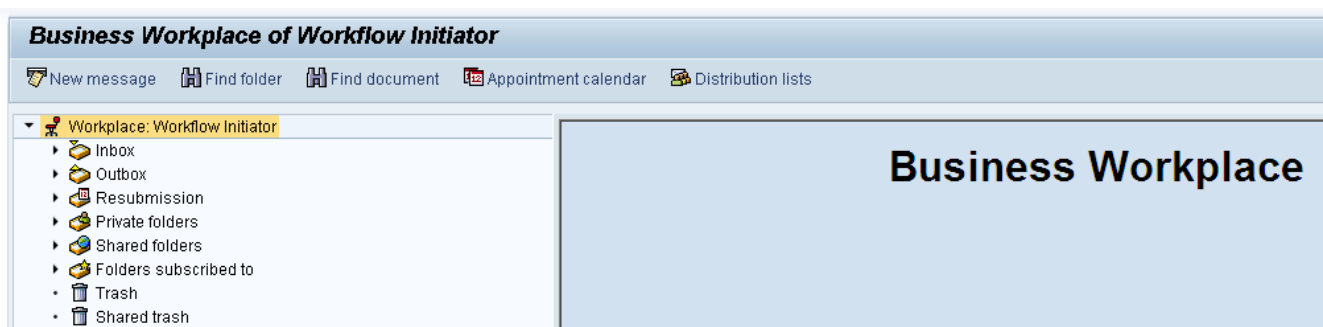
### Access Transaction:

<b>Via Menu Path:</b>	SAP menu ==> Office ==> SBWP – Workplace
<b>Via Transaction Code:</b>	SBWP, PA40



20. Click the **SAP Business Workplace (Ctrl+F12)**  button.

These instructions assume you have already initiated the Separation Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Separation in the system.



21. Select **Inbox >> Workflow**.

You can process using step 22 or step 23.

**Business Workplace of Workflow Initiator**

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Initiator

- Inbox
  - Unread Documents 0
  - Documents 0
  - Workflow 1**
  - Overdue entries 0
  - Deadline Messages 0
  - Incorrect entries 0
- Outbox
- Resubmission
- Private folders
- Shared folders
- Folders subscribed to
- Trash
- Shared trash

**Workflow 1**

Ex	Title	Status	Creation Da...	Creation ...	P	Att...	Co...	W...
	4601 Create PA Action - Separation (NC) for Susan Castro - PCR		06/09/2011	13:21:31	5			

Tips & tricks: Display Other Columns...

**4601 Create PA Action - Separation (NC) for Susan Castro - PCR: 1000005322**

Description	Objects and attachments
<p>PCR Initiator,</p> <p>Please complete all data for the new personnel action for Employee Susan Castro ~ Personnel #80000610 based on the attached request.</p> <p>* Make sure to <u>Save</u> your changes before exiting from the screen, and do not press the 'Complete Work Item' button until the necessary changes have been Completed.</p>	<ul style="list-style-type: none"><li>• <a href="#">PA PCR: Susan Castro PCR:1000005322</a></li><li>• <a href="#">PCR_List: Workflow Tracker</a></li></ul>

22. Select the **PCR** **4601 Create PA Action - Separation (NC) for Susan Castro - PCR: 1000005322** row.  
Double Click on row

A list of your approved (or rejected) PCR's are listed on the right side of the screen. You may view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. After the PCR is executed the Separation action will be launched.

23. Click the **Execute (F8)**  button.

**Personnel Actions**

Object manager scenario: EMPLOYEE

Personnel no. 80000610  
 Name Susan Castro  
 EEGroup A SPA Employees  
 EESubgroup A1 FT N-FLSAOT Perm  
 From 06/30/2011

PersA 4601 Cultural Resources  
 CostC 4699999999 CULTURE RESOUR...

Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			
<b>Separation (NC)</b>			
Career Progression (NC)			
Band Revision (NC)			

24. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From.  <b>Example:</b> 06/30/2011

25. Highlight the **Separation NC** action type.

26. Click the **Execute (F8)**  button.

The effective date is the last day worked. The SAP system will automatically add a day to your date. For example: Employee is separating 6/30/2011. This is the date you enter. The system will add the one day to make it 7/01/2011.

When you have received approval to process the action, you will enter the effective date on the first Action screen IT0000. The next screen, IT0001 defaults 1 day after. This date should not be changed except for IT0416 (Time Quota Compensation), which should be changed to 06/30/2011. If the date is changed for any other infotype, the employee will not receive the last day of pay.

### Copy Actions (0000)

Execute info group
 Change info group

Pers.No. 80000610  
 Name Susan Castro  
 EEGroup A SPA Employees PersA 4601 Cultural Resources  
 EESubgroup A1 FT N-FLSAOT Perm  
 Start 07/01/2011 to 12/31/9999

**Personnel action**  
 Action Type ZG Separation (NC)  
 Reason for Action 01 Better Employment

**Status**  
 Customer-specific  
 Employment 0 Withdrawn  
 Special payment 0 No special payment

**Organizational assignment**  
 Position 65001875 Lighting And Interactive  
 Personnel area 4601 Cultural Resources  
 Employee group A SPA Employees  
 Employee subgroup A1 FT N-FLSAOT Perm

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action

27. Click the Enter button.

28. Click the Save (Ctrl+S) button.

Employment status should always be withdrawn.




Notice at the top of this screen the title includes the word “Copy”. This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word “Create” in the title indicates that this infotype is being created on this person's record for the first time.

Best practice is to review all data, and click Enter to allow the system to validate the data.

29. Click **Edit, >> Maintain text.**

To add your comment based on agency or OSP Policy/Guidelines. Remember you can cut and paste from the PCR.

30. Click the **Enter**  button.

31. Click the **Save (Ctrl+S)**  button.

32. Click the **Yes**  button.

This will open the position as vacant when the Separation action is complete.

### Copy Organizational Assignment (0001)

Org Structure

Personnel No	80000610	Name	Susan Castro
EEGroup	A	SPA Employees	PersA 4601 Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu Withdrawn
Start	07/01/2011	to	12/31/9999

**Enterprise structure**

CoCode	NC01	STATE OF NC	Subarea	NC01	7day Norm
Pers.area	4601	Cultural Resources	Bus. Area	4600	Cultural Resources
Cost Ctr	4699999999	CULTURE RESOU...	Fund	4699999999	CULTURE- SUSP...
Func. Area	6000000000000001	General Government			

**Personnel structure**

EE group	A	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FT N-FLSAOT Perm	Contract		

**Organizational plan**

Position	99999999	Integration: default po...
Job key	30001528	Museum Specialist
Org. Unit	20010310	CR CDS A&H MOH D...
Org.key	4601469999999999	
Supervisor		




33. Click the **Enter** button.

Notice that the Position number will change to all 9's.

34. Click the **Save (Ctrl+S)** button.

The system will provide a yellow warning message informing you the existing record will be delimited. Click **Save** to go past this warning message.

### Copy Date Specifications (0041)

Personnel No  Name

EEGroup  SPA Employees PersA  Cultural Resources

EESubgroup  FT N-FLSAOT Perm Statu

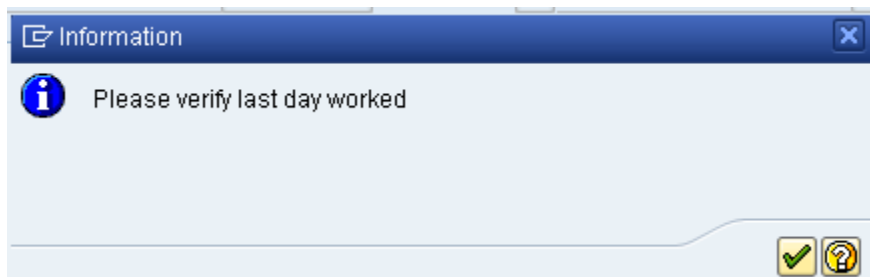
Start  to

Date Specifications			
Date type	Date	Date type	Date
<input type="text" value="01"/> Original Hire Date	<input type="text" value="01/01/2008"/>	<input type="text" value="02"/> Agency Hire Date	<input type="text" value="01/01/2008"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="03"/> Last Day Worked	<input type="text" value="06/30/2011"/>

35. Click the **Enter**  button.

36. Click the **Save (Ctrl+S)**  button.

The Last Day Worked field should fill in by default. If not, enter the type **03** for the **Last Day Worked** and enter the date of the last day worked.



37. Click the **Enter**  button.

### Create Cost Distribution (0027)

Org. Management info

Personnel No 80000610 Name Susan Castro

EGroup A SPA Employees PersA 4601 Cultural Resources

ESubgroup A1 FT N-FLSAOT Perm Statu Withdrawn

Start 07/01/2011 To 12/31/9999


Distrib. 01 Wage/salary

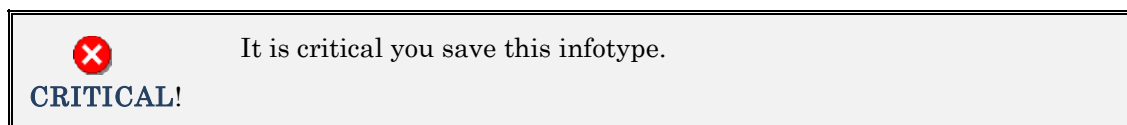
Master cost center 4699999999 CULTURE RESOURCES

Co...	Cost ctr	Order	WBS element	Name	Pct.	Name of
NC01	4611000000	1000000005437		DIRECTOR'S OFFICE	100.00	4601150

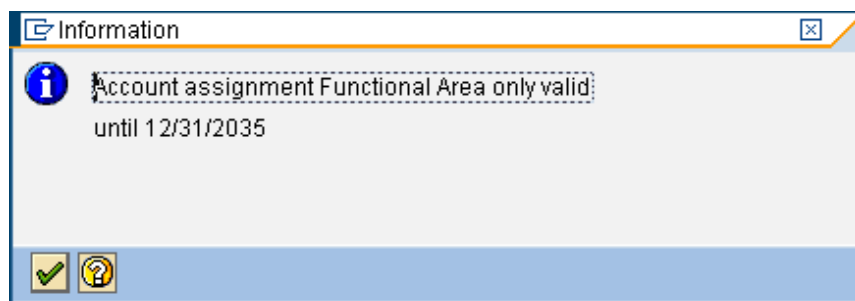
New entries Entry 1 / 1

38. Click the **Enter**  button.

39. Click the **Save (Ctrl+S)**  button.

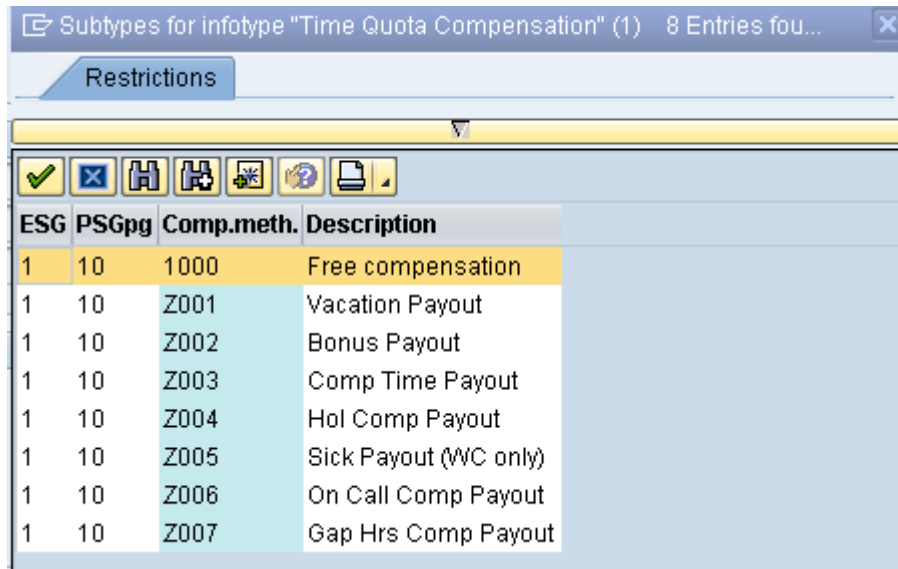


This information is automatically copied from IT1018. No entry is required here.



40. Click the **(Enter)**  button.

The pop-up box indicates validity of Account Assignment. Do not worry about the end date being only through 2035 - this is the end validity date for all financial data in the system.



The screenshot shows a SAP window titled "Subtypes for infotype 'Time Quota Compensation' (1) 8 Entries fou...". It features a "Restrictions" tab and a toolbar with icons for selection, deletion, and other actions. Below the toolbar is a table with four columns: ESG, PSGpg, Comp.meth., and Description. The table lists eight entries, with the first entry highlighted in yellow.

ESG	PSGpg	Comp.meth.	Description
1	10	1000	Free compensation
1	10	Z001	Vacation Payout
1	10	Z002	Bonus Payout
1	10	Z003	Comp Time Payout
1	10	Z004	Hol Comp Payout
1	10	Z005	Sick Payout (WC only)
1	10	Z006	On Call Comp Payout
1	10	Z007	Gap Hrs Comp Payout

41. Select the **Vacation Payout** code in the list box.

42. Click the **(Enter)**  button.

Choose the appropriate type of leave to be paid out.

### Create Time Quota Compensation (0416)

Personnel No  Name   
 EE group  SPA Employees Personnel ar  Cultural Resources  
 WS rule  MTWHF-8,SaS-O Status   
 Start    
 Comp. method  Vacation Payout

Compensation specifications
 


Time quota type	<input type="text" value="10"/>	Vacation Leave
Compensation rule	<input type="text" value="000"/>	
No. to compensate	<input type="text" value="240.00000"/>	

Absence quotas						
	ATy	Quota text	Entitl.	Unit	Comp.	Rem.
	10	Vacation Leave	267.99000	Hours	0.00000	267.99000
	15	Sick Leave	317.11000	Hours	0.00000	317.11000
	40	Holiday Leave	8.00000	Hours	0.00000	8.00000
	40	Holiday Leave	8.00000	Hours	0.00000	8.00000
	65	Community Service Lea...	24.00000	Hours	0.00000	24.00000
	65	Community Service Lea...	24.00000	Hours	0.00000	24.00000
	65	Community Service Lea...	24.00000	Hours	0.00000	24.00000
	65	Community Service Lea...	24.00000	Hours	0.00000	24.00000

43. Update the following field:

Field Name	Description	Values
No. to compensate	The number of hours to compensate.	Enter value in No. to compensate.  <b>Example:</b> 240
Start	Effective date of action	Enter value  <b>Example:</b> 06/30/2011

44. Click the **Enter** button

45. Click the **Save (Ctrl+S)**  button.

The system will show you the number of hours per quota type available for compensation. Enter the total number of hours to be paid out for the quota type chosen here.

If the balances are not ready to payout, skip infotype by:

46. Click the **Next record (Shift+F7)**  button.

If the balances are not ready to payout, skip and create by using transaction code PA30.

**Notes:**

You will need to change the date to the effective date of separation, otherwise the system will not pay out the vacation since the person is no longer active.

Time evaluation is run nightly, so the balances should be current each day.

The balances are current based on the time the Time Administrator or Supervisor has approved.

If employee has vacation, bonus or eligible for overtime payout you will prepare one payout here and when action is completed you will need to prepare the others using transaction code PA30, infotype 0416.

Longevity is calculated by a rule in Time in the background and submitted to Payroll for payout.



**Information**

**Important!**

Notify your Agency Leave Administrator of the Separation to create any needed IT2013's with the appropriate time types.


When you use the separation reason Beacon to Non-Beacon, the HR/Payroll system automatically stops pro-rated longevity by running the Time Transfer Specifications (IT 2012) in the background. After you separate an employee using this reason, you should use PA20 to view the IT 2012.


**Delimit Objects on Loan (0040)**

Personnel No  Name


EEGroup  SPA Employees PersA  Cultural Resources

EESubgroup  FT N-FLSAOT Perm Statu Active

 Choose  To  STy.  Delimit.Date

Overview						
Start Date	End Date	Object on lo...	Name	No.	Loan object number	
01/01/2008	12/31/9999	01	State ID		1 5551735	

47. Highlight and click the **01/01/2008** row.

48. Click the **Delimit (Shift+F1)**  button.

The list of Objects on Loan will display. Highlight all items to be delimited (creates an end date on the record), and click Delimit. Verify the supervisor has collected the items prior to delimiting.

Skip items that have not been collected yet. Use transaction PA30 infotype 0040 to delimit the objects on loan when they have been collected.



**Personnel Actions**

Object manager scenario: EMPLOYEE

Person

- Collective search help
- Search Term
- Free search

Personnel no. 80000610

Name Susan Castro

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOUR...

From 06/30/2011

Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			
<b>Separation (NC)</b>			
Career Progression (NC)			
Band Revision (NC)			

49. Click the **Back (F3)**  button.


This Work Item Has To Be Completed Explicitly...

Info. Log Attachmnts Agents

### 4601 Create PA Action - Separation (NC) for Susan Castro - PCR: 1000005322

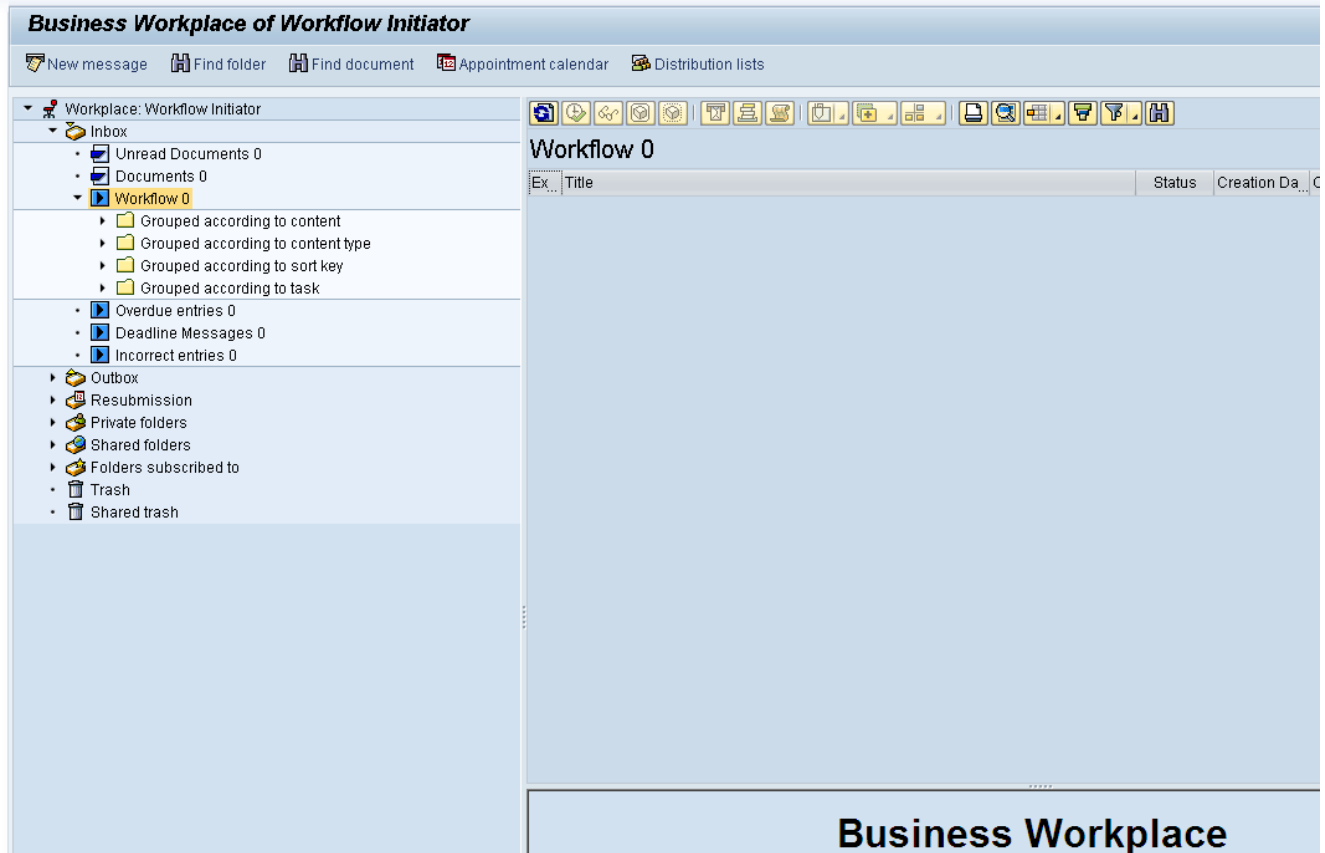
Description	Objects and attachments
<p>PCR Initiator,</p> <p>Please complete all data for the new personnel action for Employee Susan Castro ~ Personnel #80000610 based on the attached request.</p> <p>* Make sure to <u>Save</u> your changes before exiting from the screen, and do not press the 'Complete Work Item' button until the necessary changes have been Completed.</p> <p>** If you need to Cancel the entire PCR, click once on the work item to highlight it. press the 'Other functions...' button</p>	<ul style="list-style-type: none"><li>• <a href="#">PA PCR: Susan Castro PCR: 1000005322</a></li><li>• <a href="#">PCR_List: Workflow Tracker</a></li></ul>

✓ Complete Work Item ✗ Cancel

50. Click the **Complete Item**  button.

Only once all of the infotype screens within the action have been processed and the system has returned you to the main screen will this Complete button be visible. Now you may complete the PCR in workflow.

Only choose **Complete Work Item** if you have completed all steps of the Separation process, including additional payout types if appropriate. This will mark the Separation PCR as complete.



51. Click the **Back (F3)**  button.

You may remain in this SAP Business Workplace and process additional PCR's, or click **Back** to return to the main SAP screen.

52. The Separation action is complete but we recommend reviewing via PA20 all infotypes that have been processed.

## ADDITIONAL RESOURCES

<b>Webinars</b>	<ul style="list-style-type: none"><li>• May 4, 2010</li><li>• February 1, 2011</li></ul> <p><i>Conference Calls and Webinars &gt; HR Conference Call Webinars</i></p>
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